

# Office of Performance Improvement

## 6 Year Strategic Plan



**FY13-FY19**

The Office of Performance Improvement (OPI) was formed in January 2012 during Mayor Greg Fischer's first term. The ***mission of the office is to help Louisville Metro Government become the best managed city government in the country.*** To achieve this goal OPI works to further develop the mindsets and capabilities of Metro employees as well as the plans, performance measures, and processes Metro departments require to continually improve.

In its first year, OPI helped Louisville Metro Government achieve a number of ***milestones*** including:

- Establishment of a new Metro-wide planning process,
- Completion of the Louisville Metro Government Six Year Strategic Plan and more than 20 individual department strategic plans,
- Institution of the LouieStat program with nine departments,
- Certification of ten Metro employees in Lean Process Improvement and training of more than 50 employees in continuous improvement methods,
- Execution of eight separate cross-functional teams projected to save Metro government close to \$2.0 million in 2013.

These accomplishments were achieved using best-practices in management and process improvement taken from the private, public and social sectors.

The results from OPI's first year indicate the very real impact and value of this office, which has already made substantial contributions to achieving the Mayor's objectives of delivering excellent city services, resolving the systemic budget imbalance, taking job creation to the next level, investing in our people and creating plans for a vibrant future. Though we recognize the ***constraints*** faced due to competing demands for budget dollars and resources in Louisville Metro Government, the business case for OPI as a self-sustaining center of excellence is clear. As evidenced by its success in many other organizations from Fortune500 companies like Humana to the city of Baltimore, MD, the savings, efficiencies, and quality improvements delivered by equivalent "OPIs" have paid for their existence and generated substantial return on investment.

Looking forward, OPI has an ambitious ***vision of every Louisville Metro Government employee as an agent of change capable of using data and best-in-class management practices to create the best city government possible.*** To realize this vision, we've outlined a number of short and long-term goals spanning the next six years. We've also identified some of the resources and initiatives required to meet OPI's goals. While we are confident in the soundness of this plan and our goals overall, we recognize that this is a living document which will evolve with time and that achieving these goals will require continuous planning, effective risk management, appropriate resourcing, diligent execution, evaluation and learning from what works and what does not.

The OPI team is passionate about our mission and vision and grateful for the opportunity to support Louisville Metro Government. We commit to make progress against this plan and to strive to deliver on the goals we've identified to help Louisville Metro Government become the best managed city government in the country.

Sincerely,

Theresa Reno-Weber, Chief of Performance Improvement  
& the OPI Team

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### **Overview of Sections**

#### **Vision for Louisville**

The future state Louisville Metro Government envisions for our city, for the residents of Louisville, and for all who visit.

#### **Mission**

Why the department exists within Metro and for the community.

#### **Core Services/Programs**

What a department provides to residents to fulfill its mission and meet the 5 strategic objectives of Louisville Metro Government: *Deliver excellent city services; solve systemic budget issues; Take job creation to the next level; Invest in Our People and Neighborhoods, Advance “Quality of Place”; Create plans for a vibrant future.*

#### **Objectives**

Louisville Metro Government objectives are the five strategic outcomes the Fischer Administration is driving towards. While every department strives to achieve the 5 objectives for Louisville Metro Government, each has its own functional objectives or high-level accomplishments it strives to achieve to fulfill its mission.

#### **Goals**

Departments should include applicable Louisville Metro Government strategic goals as their own, as well as develop department specific short (1-2yr), mid (2-4yr) and long (4-6yr) term strategic goals.

Short term goals (and midterm if feasible) should be Specific, Measureable, Attainable, Realistic, and Time-Framed (SMART) statements about what the department will accomplish within the next 1-2 years to meet its mission, achieve its objectives and support the strategic objectives of the city to help realize the vision for Louisville Metro Government. Mid- and long term goals may be more broad and less “SMART”.

The numbers to the right of each goal indicate which of the five Louisville Metro Government strategic objectives the goal supports. The “Lead” column refers to who has ownership over the goal; however various individuals may lead supporting initiatives to the goal. The “Why” column describes why the goal is important to the department and the residents of Louisville.

The “Initiatives” column lists at a high-level, the specific projects a department will undertake (initiate and/or execute) over the next 1-2 years to help achieve their short and, as appropriate, mid-term goals; individual initiatives are not required, unless clearly known, for mid and long term goals.

The “How” column under mid- and long term goals, explains initial ways in which the department envisions making progress towards the goal.

#### **Louisville Metro Planning Cycle & Calendar**

The new fiscal year planning cycle for Louisville Metro Government puts all Departments on the same strategic planning cycle, sequenced to guide budget and operational planning.

**Purpose and Vision of Louisville Metro Government**

Louisville Metro Government is the catalyst for creating a world-class city that provides its citizens with safe and vibrant neighborhoods, great jobs, a strong system of education and innovation, and a high quality of life.

*“Louisville is a city of lifelong learning and great jobs, wellness, and compassion”*

**Louisville Metro Government Objectives**

*These five objectives are the ultimate outcomes the Fischer Administration is working hard to achieve.*

- 1. Deliver Excellent City Services.** *We strive to be the best city government in America and will use a robust measurement system to drive employee performance and track our results.*
- 2. Solve Systemic Budget Issues.** *We will resolve the structural budget imbalance that limits our city and its growth. Our expenses cannot continue to outpace revenue growth.*
- 3. Take Job Creation To The Next Level.** *We will create a culture of innovation that fosters the growth of 21st Century jobs, focusing on our strategic economic development strengths—lifelong wellness and aging care, value-added logistics, advanced manufacturing, and the food and beverage industry. We will champion a business-friendly entrepreneurial environment that recognizes education is the foundation for job creation. We will work with our schools, colleges and universities to deliver a 21st century workforce.*
- 4. Invest In Our People And Neighborhoods, Advance “Quality Of Place”.** *We will build on Louisville’s unique and creative people and history, embracing all citizens and our growing international population, by improving public transportation, the arts, and our parks. We will ensure a safe, inclusive, clean and green city -- a city that looks toward the future by capitalizing on our diverse population, our geography, and the Ohio River.*
- 5. Create Plans For A Vibrant Future.** *We will develop and begin implementation of a 25-year vision for the city, including targeted neighborhood revitalization. The vision will detail how the city will look, feel and flow in the short, mid, and long term.*

**Vision for the Office of Performance Improvement**

Every Louisville Metro Government employee is an agent of change capable of using data and best-in-class management practices to create the best city government possible.

**Mission Statement for the Office of Performance Improvement**

Our Mission is to help Louisville Metro Government become the best managed city government in the country. To achieve this goal we work to further develop the mindsets and capabilities of Metro employees and the plans, performance measures and processes of Metro departments required to continually improve.

**Core Services/Programs**

*What the department provides to residents to fulfill its mission and help meet Louisville Metro Government's 5 strategic objectives.*

❖ **Strategic Planning**

- The Office of Performance Improvement's role in Strategic Planning is to translate the Mayor's multi-year vision and goals into a comprehensive strategic plan that cascades throughout Metro Government and aligns the strategic goals and initiatives of all Metro Departments and Agencies with the current Administration's goals. OPI manages the Louisville Metro Planning Cycle, providing guidance to departments on planning milestones, plan preparation, development and execution.

❖ **Performance Management**

- OPI is the business owner of a performance management program entitled, Louisville Statistics (abbreviated LouieStat). LouieStat brings individual Metro departments before the Mayor and his senior leadership team every six to eight weeks to identify and discuss, through consistent metrics tracking and data analysis, what the department (and Metro Government) can do to continually improve the services it delivers to the citizens of Louisville. In between LouieStat forums, OPI supports the department through management consulting, measurement identification, data analysis, performance reporting, training and coaching. OPI maintains the LouieStat website ([www.louiestat.louisvilleky.gov](http://www.louiestat.louisvilleky.gov)), which communicates each LouieStat department's performance to the public.

❖ **Continuous Improvement Consulting and Training**

- OPI provides management consulting services to all of Louisville Metro Government. OPI staff facilitate cross-functional teams tasked with solving known problems, which span multiple departments or stakeholders within Metro Government. OPI offers training to Metro leadership, management and employees in continuous improvement methodologies including Lean, Plan-Do-Check-Act Problem Solving, and Six Sigma process improvement, as well as overall management best practices.

**Department Objectives**

*The functional objectives/ high-level accomplishments the department strives to achieve through its efforts or work.*

1. Provide answers to the following key questions:
  - a. What are the key services Metro Government performs?
  - b. How does Metro Government perform those services?
  - c. How well is Metro Government performing (and how do we know)?
  - d. What can Metro Government do to perform better?
2. Cascade the enterprise plans and processes required for continuous improvement throughout Louisville Metro Government.
3. Track and analyze key performance indicators (KPIs) for each department and create a culture of data-driven decision making.
4. Build the skills and capabilities of those we work with through effective coaching and training management.
5. Address systemic challenges facing Louisville Metro Government and facilitate collaborative problem solving among appropriate stakeholders.

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**Short Term Goals (1-2yr)**

*The goals listed below detail what the department will accomplish over the next 1-2 years to meet its mission, achieve its objectives and help realize the vision for Louisville Metro Government.*

	Goal	Department Objective	Mayor's Objective	Why	Initiatives
1	<b>Establish a Louisville Metro Government Planning Cycle by the end of FY13</b>	2,4,5	1-5	Successful organizations plan. The best of the best have a set planning cycle with dates on the calendar clearly communicated to all in the organization about when planning must take place and by when it must be completed. Up until 2012, Louisville Metro Government did not have a formal, coordinated planning process connected to the budget.	<ul style="list-style-type: none"> <li>• Execute initial year of new Louisville Metro Government planning cycle (from July 1, 2012 – June 30, 2013).</li> <li>• Collaborate with OMB to develop a process for aligning strategic planning to the budget process by FY14.</li> <li>• Coach departments through linking Strategic Plan to Budget and Operational Plans.</li> <li>• Integrate tracking of appropriate strategic plan goals into LouieStat for each department in LouieStat.</li> <li>• Establish a reporting process that informs employees and citizens of progress against plan.</li> <li>• Conduct Strategic Planning Liaison retreat to gain lessons learned from this year's planning cycle.</li> </ul>
2	<b>Finalize and make public the Louisville Metro Government 6yr Strategic Plan by end of FY13</b>	2,4,5	1-5	In order to become a best-in-class city government a strategic roadmap of success is needed. The strategic plan will create a clear vision and provide direction for the Departments that will implement it.	<ul style="list-style-type: none"> <li>• Disseminate the draft LMG Strategic Plan throughout Louisville Metro Government and capture feedback from each Department on plan's content and feasibility; integrate feedback into final plan.</li> <li>• Create and launch, in coordination with Metro Technology and the Chief of Strategic Communications, the Mayor's Strategic Plan website.</li> </ul>
3	<b>Onboard 18 departments to LouieStat and help each</b>	1-5	1, 2	Through the Citizen's Bill of Rights, the Fischer	<ul style="list-style-type: none"> <li>• Develop a LouieStat playbook incorporating the 6E framework (Educate, Equip, Engage,</li> </ul>



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	<b>achieve progress against their key performance indicators by the end of FY14</b>			Administration has committed to “Focus on Results” and be open and transparent with citizens about what city government is doing and how. For that to happen, citizens must have a way to view departments’ performance overtime. Citizens can view the performance metrics for each department in LouieStat online at: <a href="http://louiestat.louisvilleky.gov">louiestat.louisvilleky.gov</a>	Empower, Execute and Evaluate) to help departments along their improvement journey. <ul style="list-style-type: none"> <li>• Develop and implement the LouieStat Program using Project Management Institute (PMI) and American Society for Quality (ASQ) best practices.</li> <li>• Deploy the enterprise model with select LouieStat departments to discover core processes and appropriate metrics for the department.</li> <li>• Help departments identify what is best-in-class for their functional area and develop a roadmap for how to get there over time using the LouieStat Maturity Model, an objective assessment of a department’s ability to use the LouieStat Program as a tool for improving their performance.</li> <li>• Provide LouieStat training to all LouieStat participants and stakeholders to build LMG’s ability to manage performance. Topics of training may include data source familiarization, data retrieval and analysis, management best practices and champion training.</li> <li>• Transfer responsibility for measuring and reporting on a department’s performance to each department.</li> </ul>
4	<b>Provide 200 employees with Lean training and skills by the end of FY14</b>	2,4	1	In order to be the best managed municipality in the world, Louisville Metro Government must adopt and deploy internationally recognized, best practice improvement strategies. Lean is one such strategy. By training the workforce of LMG, we build their capacity to be effective in	<ul style="list-style-type: none"> <li>• Facilitate the training of select LMG employees in Lean Process Improvement through JCTC’s Lean Course.</li> <li>• Coach LMG employees through execution of Lean Projects.</li> <li>• Track and validate initial improvement projects and ensure that LMG employees maintain their certifications by submitting to OPI a minimum of one CI story per year.</li> <li>• Create a process to effectively track and</li> </ul>

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				all aspects of their job: daily work, continuous improvement and breakthrough.	validate the work of recipients of Lean training.
5	<b>Facilitate the training and certification of 40 Louisville Metro Government employees in project management (PMPs, CAPMs) by the end of FY13</b>	2,4	1	For LMG employees currently managing or aspiring to manage projects, Project Management Professional (PMP) and Certified Associate in Project Management (CAPM) are nationally recognized certifications that will provide the tools, techniques, and strategies they need to be successful.	<ul style="list-style-type: none"> <li>• Facilitate training of employees currently managing large scale projects in project management best practices through the University of Louisville's Delphi Center.</li> <li>• Provide opportunity to those who've received training to sit for the PMP/CAPM certification test.</li> <li>• Develop process for tracking added value of training provided to employees in PMP/CAPM.</li> <li>• Evaluate additional need for PMP/CAPM certification and project management governance across Louisville Metro Government and identify resources to provide further training, certification and guidance as appropriate.</li> </ul>
6	<b>Facilitate the training and certification of 25 employees in Six Sigma Green Belt by the end of FY14.</b>	2,4	1	Six Sigma is an internationally recognized best practice approach to improve the operations of an organization. The Six Sigma suite of tools empowers employees to deploy a proven, scientific problem solving method against existing processes with complex issues where the solution is not apparent.	<ul style="list-style-type: none"> <li>• Facilitate the training and certification of LMG employees in Six Sigma Green Belt through the University of Louisville's Delphi Center.</li> <li>• Coach employees through selection and execution of Six Sigma Green Belt projects.</li> <li>• Track and validate Green Belt projects to ensure that results have the intended impact on the LMG.</li> <li>• Provide executive sponsor training, which speaks to the role of Green Belt project sponsors and the time and resources often required to support Green Belt level projects, to LMG leadership.</li> </ul>
7	<b>Complete five or more projects annually that produce validated cost savings to the enterprise and/or quality improvements.</b>	1-5	1,2	Numerous enterprise and department-level problems exist with the potential for significant cost savings to LMG and/or significant value for citizens. OPI can help address	<ul style="list-style-type: none"> <li>• Provide appropriate training for OPI staff in OPI core services and functional areas (e.g., Strategic Planning, LouieStat, Process Improvement, Reactive Problem Solving, Consulting, Coaching, Facilitation, etc.)</li> <li>• Grow OPI team members in Lean &amp; Six Sigma to</li> </ul>

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				these challenges, while also building the knowledge, skills and abilities of employees.	<p>the Black Belt level.</p> <ul style="list-style-type: none"> <li>• Deploy Lean and Six Sigma capabilities against priority issues.</li> <li>• Facilitate 5 or more cross-functional teams per fiscal year <ul style="list-style-type: none"> <li>○ Measure progress of teams versus the original scope and goals established</li> <li>○ Conduct management reviews along each step of process</li> <li>○ Realign goals, scope and resources as necessary</li> </ul> </li> <li>• Formalize the validation and standardization steps in the PDCA process to systematically evaluate progress of cross-functional teams and scale solutions across the organization as appropriate.</li> </ul>
8	<b>Securing funding required to appropriately support the Office of Performance Improvement with required resources by FY14</b>	1-5	1,2	Over the course of its first year, OPI demonstrated its value to Louisville Metro Government in cost savings, efficiency and quality improvements. We must ensure the sustainability of the Office of Performance Improvement and fund increases in capability required to accomplish our mission.	<ul style="list-style-type: none"> <li>• Perform a Gap Analysis to determine scope of need.</li> <li>• Identify and secure appropriate revenue stream for OPI, e.g., <ul style="list-style-type: none"> <li>○ Grant opportunities through Humana Foundation and/or other organizations</li> <li>○ Appropriation of general fund dollars</li> <li>○ Appropriation of funds from Metro Council</li> <li>○ Revenues from external consulting work</li> </ul> </li> <li>• Secure additional analyst position for LouieStat (currently one full-time analyst and a part-time fellow who will depart in Spring 2013).</li> </ul>

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**Mid-Long Term Goals (2-6yr)**

*The goals listed below detail broad goals the department plans to achieve over the next 2-6 years to meet its mission, achieve its objectives and help realize the vision for Louisville Metro Government.*

	Goal	Department Objective	Mayors Objective	Why	How
1	<b>Institutionalize the Louisville Metro Government Planning Cycle by FY16</b>	2,4,5	1-5	Successful organizations plan. The best of the best have a set planning cycle with dates on the calendar clearly communicated to all in the organization for when planning must take place and be completed by. Institutionalizing the newly created LMG planning cycle will ensure that regardless of the administration in office, LMG, like all great organizations, takes the time to plan for continued and future success.	<ul style="list-style-type: none"> <li>• Calendar all planning dates/ milestones annually.</li> <li>• Improve the current planning Sharepoint site to be user friendly (e.g., better label and organize documents, remove duplicate files, etc.).</li> <li>• Hold strategic planning liaison retreat to gather lessons learned from each planning cycle and educate and train department resources on planning cycle and effective plan development.</li> <li>• Formulate the role and membership of the Strategic Planning Core team and/or steering committee to help do the work necessary for annual planning retreat.</li> <li>• Assess current ability of departments to incorporate Strategic Plan goals into budget and operational plans; develop plan to address weaknesses as necessary.</li> </ul>
2	<b>Institutionalize LouieStat as the primary performance measurement and management system for Louisville Metro Government by FY16</b>	1-5	1, 2	Best-in-class organizations measure performance on a consistent basis and track success against their goals/targets. Nationally, the federal government and other leading cities are instituting performance "Stat" programs like LouieStat. Some cities have been doing so for more than 10 years with impressive results. LMG must make	<ul style="list-style-type: none"> <li>• Assess each department's processes and results against the Malcolm Baldrige Criteria for Performance Excellence; develop a LouieStat Playbook, strategy and implementation plan to address prioritized gaps in performance.</li> <li>• Cascade the enterprise model within all LouieStat departments to discover core processes and key performance indicators at an operational level.</li> <li>• Deploy a LouieStat Program such that each department within LMG integrates a systematic way of managing performance for results with</li> </ul>

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				LouieStat a cornerstone of its management strategy to fully capture the benefits and value an institutionalized Stat program can provide.	<p>its strategic, operational and budgetary plans.</p> <ul style="list-style-type: none"> <li>• Formalize an apprenticeship program and management leadership training program for results.</li> <li>• Establish issue based “Stat” programs as needed, e.g., Vacant and Abandoned Properties Statistics (VAPStat).</li> <li>• Deploy cross-functional teams using Lean, Six Sigma and Project Management methodologies to improve LMG’s performance for issues which come to light through the LouieStat Program.</li> <li>• Implement an enterprise data solution for performance reporting and build a data warehouse for performance data collection and retrieval; automate the transfer of data from a data warehouse to the LouieStat website.</li> </ul>
3	<b>Educate 20% (~1,100) or more of Louisville Metro Government Employees on Continuous Improvement methodologies by FY16</b>	1-5	1, 2	Successful transformations require the initial buy-in and support of 20% of the organization; that 20% can serve as advocates for the work of continuous improvement and help change the culture of LMG to a best-in-class organization.	<ul style="list-style-type: none"> <li>• Grow Lean and Six Sigma capabilities of OPI Team members to the Master Black Belt Level.</li> <li>• Provide instruction on continuous improvement methodologies as a part of LouieStat and Cross-Functional Team training.</li> <li>• Facilitate the annual Day of Celebration to introduce Metro employees &amp; the community to LMG’s continuous improvement methods and celebrate the daily, continuous improvement &amp; break through work of all employees.</li> <li>• Host workshops and lunch &amp; learns to introduce Lean, PDCA and other methodologies to a wide audience.</li> </ul>
4	<b>Create Performance Centers of Excellence (COEs) within 5 Louisville Metro Government departments by FY19</b>	1-5	1,2	To help realize OPI’s vision of a LMG where every employee is able to apply best management practices to	<ul style="list-style-type: none"> <li>• Develop SOPs for core services and functions of OPI (e.g., meeting management, reactive problem solving, Lean process improvement, Six Sigma level analysis and problem solving,</li> </ul>

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				improve their work on a continually basis, the largest departments must have the knowledge and resources to solve their own problems.	<p>etc.).</p> <ul style="list-style-type: none"> <li>• Establish centralized COE within OPI around best-in-class performance management and improvement processes by FY15.</li> <li>• Pilot department COE program in PW&amp;A where there is already a Performance Coordinator and Performance Analyst role.</li> <li>• Identify departments with the highest LouieStat Maturity scores and organizational capabilities and create support organizations with trained resources in adopting and implementing core processes (e.g., Strategic Planning, LouieStat, PDCA, Lean, etc.).</li> </ul>
5	<b>Achieve \$1M or more in annual positive impact on LMG through reduced costs, improved efficiency or new revenues.</b>	1-5	1,2	The private sector and other industries use performance improvement offices to reduce costs. High performing organizations use an improved management strategy to become more agile, faster, cheaper and better. OPI should generate a return on investment for LMG in these areas.	<ul style="list-style-type: none"> <li>• Create a process for assigning value to critical, high-priority quality and Lean/Six Sigma projects.</li> <li>• Implement high-priority, revenue generating projects.</li> <li>• Validate the tangible benefits of projects and cross-functional teams.</li> <li>• Reinforce the training needs of sponsors, project leaders and project team members on Lean and Six Sigma.</li> <li>• Formally transfer responsibility for continued implementation of recommendations to business owners.</li> </ul>
6	<b>Obtain consistent recognition as a national leader in performance management in the public sector</b>	1,4	1	In our pursuit to be the best city government in the country, we strive to be a best-in-class office. One measure of this will be national recognition by our peers. National recognition will allow OPI to bring more resources to Louisville. As Mayor Fischer states, "someone will be the best,	<ul style="list-style-type: none"> <li>• Cross train OPI Staff persons in the core services of the Office and grow the skillsets and capabilities of OPI team members; bring in new members, and implement succession planning.</li> <li>• Network with professionals in the private, public and social sectors who are dedicated to organizational performance.</li> <li>• Attend conferences for professional development, expert feedback and learning opportunities.</li> </ul>

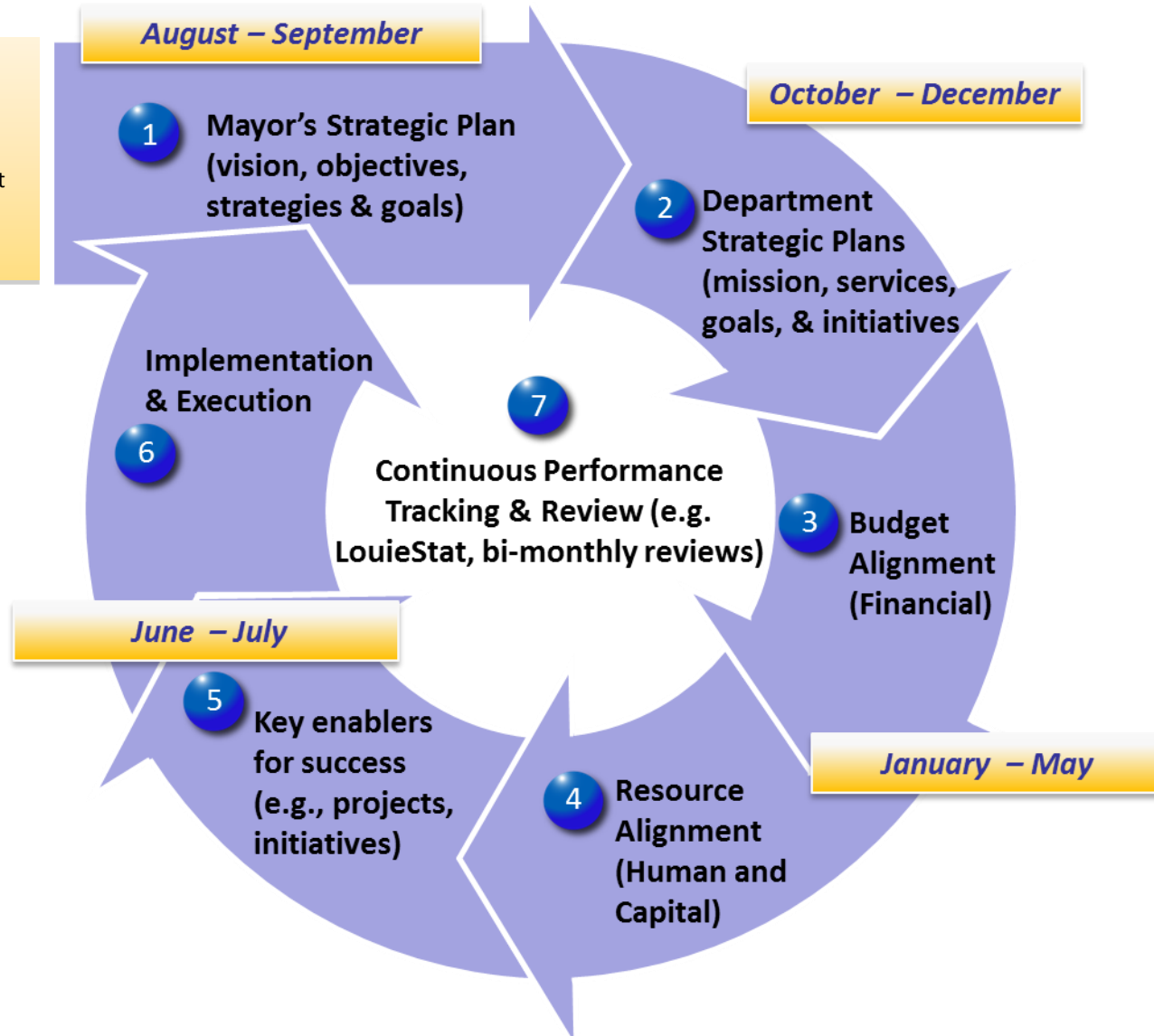
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				why not us?"	<ul style="list-style-type: none"><li>• Win an International City/County Management Association (ICMA) annual award for OPI's creative contribution to professional local government management.</li><li>• Win a level four Kentucky Award for Performance Excellence, a necessary step before OPI applies for a national Malcolm Baldrige Quality Award.</li></ul>
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### Louisville Metro Government (LMG) Planning Cycle

#### Louisville Metro Planning Cycle

The new fiscal year planning cycle for Louisville Metro Government puts all Departments on the same strategic planning cycle, sequenced to guide budget and operational planning.





**Louisville Metro Government (LMG) Planning Calendar**

May	June	July	August	Sept.	Oct.	Nov.	Dec.	Jan	Feb	March	April
	Final Budget Released	Start of New Fiscal Year						Mayor Releases Strategic Plan			
Louisville Metro Current State Internal Assessment			Louisville Metro Senior Leadership Visioning retreat	Refine Louisville Metro Goals & Tactics	Provide Draft Louisville Metro 6 Year Strategic Plan to Departments			Mayor and Senior Staff review and reconcile with Mayor’s priorities and work with Departments and OMB to finalize budget proposal by May 1			
Louisville Metro External Assessment (e.g., Macro Trends, Benchmarks, Best practice)					Develop Department 6 Year Strategic Plans			Departments Finalize Strategic Plans & Develop 1 year Budgetary and Operational Plans		Departments finalize 1 year Budgetary and Operational Plans	
				Departments conduct their own internal and external assessments							